

SEARCHES/ CLIENT RATE DOWNLOAD

Introduction

This section of the document will show how a TPA can download the tax rates of clients assigned to the TPA account.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the section 'Logging In'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	TPA Home
Employment and Wage Detail Reporting	TPA Home TPA Home
Payment Information	
Searches	
User Maintenance	
	<div> Account Maintenance View or update TPA account information such as; Name, Organization Type, addresses and phone numbers. </div> <div> Employment and Wage Detail Reporting Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function. </div> <div> Searches Search for employers for which the TPA has been assigned account access. </div> <div> Assign TPA Role Submit client(s) for assignment of employment and wage detail and payment roles </div> <div> Payment Information Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function. </div> <div> User Maintenance Create new or update existing TPA user information </div>

2. Click on the link 'Searches'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXXXX
Assign TPA Role	Searches
Employment and Wage Detail Reporting	Client/Rate Download Search for Employer/client rates file.
Payment Information	Employer Search Search for Employers/clients by Employer Name, Employer Account Number, and/or role.
Searches	
<ul style="list-style-type: none"> ▸ Client/Rate Download ▸ Employer Search 	
User Maintenance	

3. Click on the link 'Client/Rate Download'. The following page will appear.

Change Password Logoff	
TPA Home Account Maintenance Correspondence Employment and Wage Detail Reporting Payment Information Searches • Client/Rate Download • Employer Search User Maintenance	Third Party Administrator
	TPA ID: 1001 TPA Name: XXXX
	Client/Rate Download
	Enter dates to search for all rate files created between 'From' and 'To' dates.
	Date Range From: <input type="text"/> To: <input type="text"/>
	<input type="button" value="Reset"/> <input type="button" value="Search"/>

4. Enter a date range parameter for rate file creation. Click on 'Search'.
5. Follow the prompts to download the file to your local folders.